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ABSTRACT

This in-basket-simulation learning module on the activities of a secretary for secondary and postsecondary teachers and students, the eighth in a series of eleven task and in-basket simulations, was designed to provide individualized instruction in office occupations courses, such as introductory business and typewriting. (Each module in the set is designated A, B, or C, representing level of difficulty from, respectively, easy to difficult.) The module is divided into two parts. The first, developed for teacher use, includes the following: teacher instructions; definitions of task and in-basket simulations; objectives (in-basket tasks to prioritize); prior student experiences; necessary supplies and resources; completion time; method of evaluation; answer key; and answer sheet. The second part, developed for student use, includes the following: objectives (in-basket tasks to prioritize); prior student experiences; necessary supplies and resources; description of simulation situation; instructions; and in-basket items to prioritize. (This module was developed around performance objectives 4 and 7 of the V-TECS [Vocational-Technical Education Consortium of States] Secretarial Catalog. Other related office occupations instructional materials are available in ERIC--see note.) (EM)

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IN–BASKET SIMULATION

OFFICE PROCEDURES

TEACHER

B

SECRETARY TO THE MANAGER OF AN INSTALLMENT LOAN DEPARTMENT OF A BANK

Developed by

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TEACHER INSTRUCTIONS

The task and in-basket simulations have been developed to supplement performance objectives in the V-TECS Secretarial Catalog. The simulations are designed for individualized instruction and can be used in several office occupations courses. Teachers involved in a 1976 EPDA workshop wrote the simulations and tested these materials in their classrooms. Suggested time limits may vary according to the ability and experience of your students.

The level of difficulty is noted on each simulation. "A" indicates an easy simulation, "B" average, and "C" difficult. This rating may vary according to the capabilities of your students. Pre-tests are included in the task simulations.

Students should not write on the simulations. Answer sheets for the in-basket simulations are included in the teacher materials and should be duplicated as needed. The teacher key for in-basket simulations reflects one correct method of listing priorities. Evaluation should be flexible. If a student can justify answers which differ from the suggested answers, they should be accepted as correct. You may prefer to use the in-basket simulations as learning experiences rather than for evaluation purposes.

Teachers should complete each simulation before making assignments to students. You must be familiar with the contents in order to answer questions. Avoid giving too many directions and hints. The purpose of the simulations is to teach your students to think and to make decisions under pressure.

DEFINITIONS

A task simulation is an instructional technique in which the learner performs several different tasks. The simulation requires that the learner use previously acquired skills and knowledge in order to complete the tasks. An in-basket simulation is a technique in which a specific position is described and in which the learner is required to make decisions about the priority of each task described in the simulation. In an in-basket simulation, tasks are not performed by the student but are listed in order of priority.

THIS IN-BASKET SIMULATION CORRELATES WITH V-TECS PERFORMANCE OBJECTIVES 4 AND 7 IN THE V-TECS SECRETARIAL CATALOG.

TITLE:

Secretary to the Manager of an Installment Loan Department of a Bank.

OBJECTIVE:

Given numerous tasks that a secretary in an installment loan department of a bank would be expected to perform, the student will list the tasks in their order of priority.

PRIOR STUDENT EXPERIENCES:

Instruction in an office procedures class dealing with setting office tasks priorities.

NECESSARY SUPPLIES AND RESOURCE MATERIALS:

Student In-Basket Simulation (Office Procedures)
Answer Sheet
Pen or Pencil
Scratch Paper
Office Procedures Textbooks
Banking Information from State Bankers Association
V-TECS Secretarial Catalog

COMPLETION TIME:

20 minutes

METHOD OF EVALUATION:

Student's simulations do not include an answer sheet. Duplicate the answer sheet that is attached and give a copy to each student doing the simulation. Students should not mark on simulations--only on answer sheets.

The teacher should check each answer sheet. Each item is worth 8 points. (Four for priority order and four for coding the level of priority.)

Some variation may occur among students in listing priorities. If they can show justification, they should receive credit.

It is suggested that this simulation be used for practice in decision making and not for testing.

ANSWER KEY

1.	A	IMM	Process Mail
2.	K	IMM	Call repair service for dictating machine
3.	H	IMP	Make 3 copies of report for Mr. Burns by 10 a.m.
4.	E	IMP	Get forms for Alice Morgan by 10 a.m.
5.	C	IMP	Call George Stone--needs to get to bank by 1 p.m.
6.	B	IMP	Call Quality Supply and order binders
7.	L	IMP	Call Quality Printers and order letterhead
8.	G	IMP	Type first letter on transcribing machine for Mr. Longacre to pick up at 3 p.m.
9.	J	ROU	Call William Bland
10.	I	ROU	Order potted plant for Mrs. Johnson
11.	D	ROU	Send form letter to Mr. Jones--needs July 31
12.	F	ROU	Order items for August 5 meeting

NOTE: Some variations may occur among students in listing priorities.

If they can show justification, they should receive credit.

ANSWER SHEET

Directions: List the tasks in the order you would do them. Make sure you give a brief explanation of why you placed each task where you did.

ORDER	PRIORITY	ITEM	EXPLANATION
EX.	IMM	E	Process Mail
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			
11.			
12.			
13.			
14.			
15.			

IN-BASKET SIMULATION

OFFICE PROCEDURES

STUDENT

B

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SECRETARY TO THE MANAGER OF AN INSTALLMENT LOAN DEPARTMENT OF A BANK

OBJECTIVE:

Given numerous tasks that a secretary in an installment loan department of a bank would be expected to perform, you are to list the tasks in their order of priority within 20 minutes.

PRIOR STUDENT EXPERIENCES:

Instruction in an office procedures class dealing with various office tasks one may be expected to complete in a work situation on a priority basis.

NECESSARY SUPPLIES AND RESOURCES:

Student In-Basket Simulation (Office Procedures)
Pen or Pencil
Answer Sheet
Scratch Paper

SITUATION:

You are employed as secretary in the Installment Loan Department of Main Street National Bank in your hometown. Mr. Leonard Burns, your boss, is manager of the department.

Your job involves various office duties such as processing the mail, answering the telephone, greeting visitors, typing, collecting and organizing information, and maintaining office records. You assist Mr. Burns with customer complaints, forms, research on accounts, and death claims. You are also responsible for ordering department supplies on a weekly basis.

Mr. Burns often works late hours or comes in early to complete his work. As you enter the office this morning at 8:30 a.m., July 27, you notice that a number of items have been placed on your desk along with the regular morning mail. Mr. Burns has instructed you to process the mail as soon as it arrives each morning.

INSTRUCTIONS:

On the following pages are illustrations of various tasks you may be expected to perform. Use your judgement to determine what actions you would take and code each item according to priorities. In determining the order in which you plan to complete the tasks, consider importance and time elements. Use the following guidelines to assign the level of priority to each task:

IMMEDIATE – Those tasks that need to be completed at once.

IMPORTANT – Those tasks that need to be completed within the next hour or two.

ROUTINE – Those tasks that should be completed after the IMMEDIATE and IMPORTANT ones have been accomplished, either today or tomorrow.

HOLD – Those tasks that are not pressing, but should be completed when all others are finished, usually within the week.

CAREFULLY EXAMINE EACH ITEM AND DETERMINE ITS LEVEL OF PRIORITY.

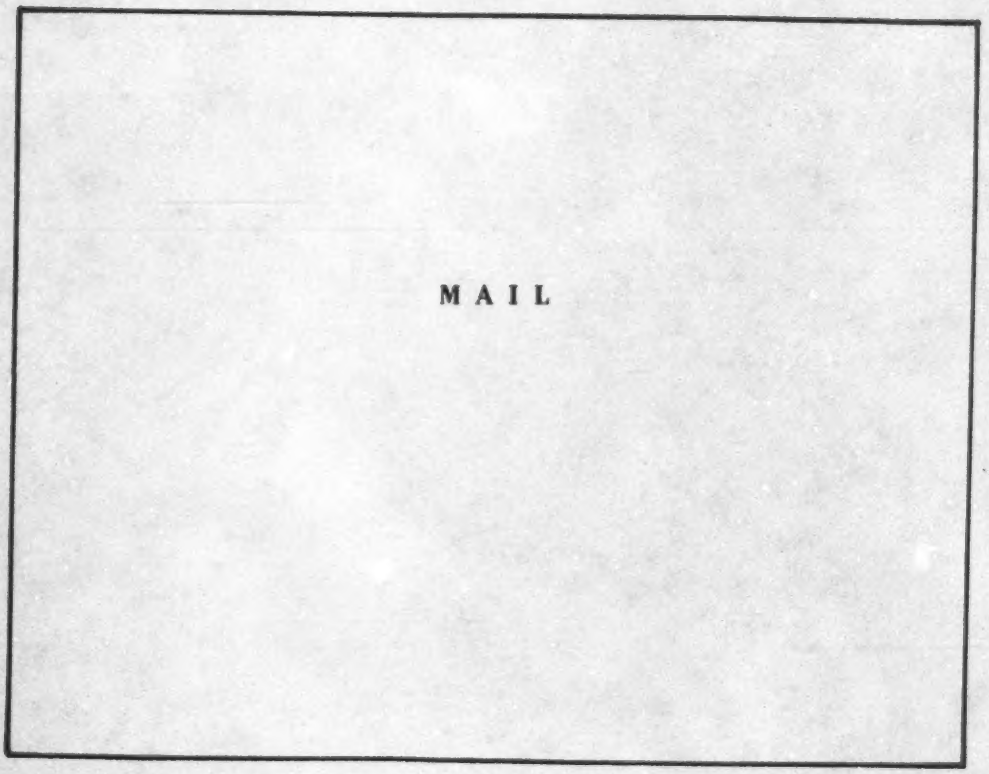
DO NOT MARK ON THESE PAGES

To simplify filling out the answer sheet, organize your work on scratch paper using the following format:

	ITEM	PRIORITY LEVEL	EXPLANATION
Ex.	O	HOL	Order Stationery

PLACE YOUR ANSWERS ON THE ANSWER SHEET PROVIDED BY YOUR INSTRUCTOR.

ITEM A



From The Desk of 7/27

LEONARD BURNS

Please call Quality Supply and order 2 leather binders, letter size, black, for my thesis for banking school.

Have them delivered and charge to our code.

Need by tomorrow morning -- must be in afternoon mail.

LB

ITEM B

To

Date 7/27 Time 8:15

While You Were Out

Mr. George Stone

of

Phone 745-9764

TELEPHONED		PLEASE CALL	✓
CALLED TO SEE YOU		WILL CALL AGAIN	
URGENT		RUSH	

Message Needs his loan balance + interest to close loan -- wants check in bank by 1 p.m.

LB
Operator

ITEM C

From The Desk of

LEONARD BURNS

Send Mr. Bevo Jones his interest statement for last year on our form letter.

He needs the information by July 31

LB

ITEM D

To

Date 7/27 Time 8:20

While You Were Out

Mrs Alice Morgan

of

Phone 723-7211

TELEPHONED	✓	PLEASE CALL	
CALLED TO SEE YOU		WILL CALL AGAIN	
URGENT		RUSH	

Message Will be in at 10 this morning to pick up forms to process husband's death claim. LB

Operator

ITEM E

Order
1 Box 0136
1 Box 1269
Need these for
branch meeting
next Tuesday,
August 4.
LB

ITEM F

7/27

Don't mail first
letter on transcribing
unit to Mr. Henry
Longare — Will pick
it up around 3 p.m.
on his way to
Sumter. LB

ITEM G

7/27

Make 3 copies of month end report and leave on my desk. I'll be back around 10 a.m. and will need them then.

LB

ITEM H

7/26

Order potted plant for Mrs. Sue Johnson. She's in Room 414 at Memorial Hospital.

Thanks!

LB

ITEM I

From the Desk of
LEONARD BURNS

7/26

Call and give William Bland, 723-2572, our unit code # and mailing address.

He has forms that I need for our branch managers' meeting next week.

LB

ITEM J

From the Desk of
LEONARD BURNS

7/26

Call repair service for dictating unit.

The backup button on my machine is hanging up.

Need this taken care of as soon as possible.

LB

ITEM K

ITEM L

From the Desk of LEONARD BURNS

Date 7/27

Call Quality Printers and ask them to Rush me a box of letterhead stationery. I'll need a master letter typed by the first of next week.

Remember, if we don't order today, it won't arrive in time.

LB